# **DocBox - Top Tips**

Quick and easy ways to get your application at the top of our queue.



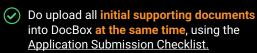


### Do's

### Don'ts







- Do ensure all different document types are uploaded separately (e.g. split out each document by type, for example 'income' or 'bank statements').
- Do supply all documents at the same time as our team will only action the file once all supporting documents are held.
- Do upload Bankwest valuations into DocBox if you have ordered an upfront valuation.

- Don't upload anything in to ApplyOnline
  (AOL) including broker submission notes.
- Don't double up and upload through DocBox & then also email through just to 'be safe'. This means double the documents on the file and double the time to assess your deal. Tip! To confirm your documents have reached us, just search the submission history screen in DocBox, which will show you all received documents.
- Don't upload Credit Files via DocBox. Credit File information (such as Equifax reports) should not be sent to the bank and cannot be saved in our systems.
- Don't upload one document that contains all the supporting documents in it, as this will delay your application by 1 business day, make sure you split them out.
- Don't select document type as 'Other' in DocBox unless there is no other relevant document type to pick from in the dropdown list. Unknown document types require renaming (and therefore can cause delays) and any corresponding notes will disappear once renamed.

## Requested documents

Do upload documents requested once the case has been assessed (e.g. MIR items) directly into our secure portal using DocBox and all at the same time.

Don't supply one document at a time, only upload all missing documents once you have addressed all points within the MIR.

#### Correspondence

Do respond to us directly through DocBox if you receive an email from Bankwest via 'CPS out' (e.g. MIR). Just free type in the commentary box & upload. This will wake up the case immediately.

Don't respond to the 'CPS out' email or via the 'supportingdocs' email, as this will not move your application to the action queue for at least 1 business day.

### Changes

Do let us know via the commentary box in DocBox of any changes you need made to the file (e.g. product switch/increase loan amount) & upload your Rework Form.

Don't email us your changes, as this will not move your application to the action queue for at least 1 business day.

**Please Note:** Maintenance requests, Home Loan Transfers, Progress Payments, and Discharges will be in the next phase of DocBox. You are still required to use the supporting docs email option for these types of requests.

#### Get customer signatures on the go.

Digital signatures are acceptable on the below list of Bankwest forms:

- <u>Direct Debit Authority</u>
- Discharge Authority
- Home Loan Maintenance
- FHOG
- Privacy Consent Notice (PCN)
- Responsible Lending Rework Template
- Fixed Rate Cap
- Progress Payment Customer Authority

